



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Initiative		Current Status (As of September 30, 2003)		Progress in Implementing the President's Management Agenda	Comments
<b>Competitive Sourcing</b>  <b>Agency Lead: Jim Campbell</b>          <b>Lead RMO Examiner: Cyndi Vallina</b>      <b>Lead OFPP Analyst: Mathew Blum</b>	  Yellow      Next ↑ est. by <u>TBD</u>	<ul style="list-style-type: none"> <li>• Approved competition plan <u>X</u> “yellow” plan on <u>Q2 2002</u> — “green” plan on <u>Q2 2004</u></li> <li>• Standard competitions <u>X</u> completed one on <u>Q4 2003</u> OR announced one that exceeds FTEs in “yellow” plan on <u>Q3 2004</u>  — announced in accordance with “green” plan schedule <u>Q3 2004</u> — in the past year completed = 90% in 12 months or less <u>Q3 2004</u>.</li> <li>• Standard and streamlined competitions <u>TBD</u> at least 10 completed since January 2001</li> <li>• Streamlined competitions completed in 90 days or less <u>X</u> = 75% during the past 2 quarters <u>3Q 2003</u> <u>X</u> = 95% during the past year on <u>3Q 2003</u></li> <li>• ≤ 10% of announced standard and streamlined competitions cancelled <u>X</u> in past two quarters <u>4Q 2003</u>. <u>X</u> in past year <u>4Q 2003</u></li> <li>• Commercial activities exempt from competition — OMB approved all categories for justification on __ (date) __</li> </ul>	  Green	<u>Actions Taken Since June 30, 2003</u> <ul style="list-style-type: none"> <li>• Transitioned to and implemented new Circular: --Reannounced ongoing studies to be in compliance with revised Circular --Converted a planned direct conversion to a streamlined study.</li> <li>• Created a formalized records management system to support revised Circular.</li> <li>• Completed Graphics competition, which was won (now in appeal) by Gov't Most Efficient Organization (estimated annual savings \$700K).</li> <li>• Streamlined Civil Rights study awarded to contractor in August (estimated annual savings \$250K).</li> <li>• Financial services study request for proposals closed on 9-9-03.</li> <li>• Human Resources/Training study issued draft performance work statement (PWS).</li> </ul> <u>Planned Actions for Q1 FY 2004</u> <ul style="list-style-type: none"> <li>• Finalize DOE A-76 guidance</li> <li>• Complete data entry for Info Mgmt System in coordination with OMB.</li> <li>• Transition to winning service providers of graphics and Civil Rights studies.</li> <li>• Release PWS for IT study and solicitation for Logistics.</li> </ul>	<ul style="list-style-type: none"> <li>• General progress against Proud-to- Be goals appears to be on track.</li> <li>• DOE's scores for status and progress will remain yellow and green if it continues to meet its objectives.</li> <li>• DOE plans to study all Code B commercial FTEs as listed in the FY 2003 inventory (3,322 FTE) except Power Marketing Administrations (PMAs) (976 FTE). (OMB previously gave approval for PMAs to be excluded temporarily, but thought they may be studied in the future.)</li> <li>• Without the PMAs, DOE determined that 2,346 total positions need to be studied; 1,180 FTEs currently under study.</li> <li>• DOE intends to announce 600-800 FTEs for study in FY 2004; 200-400 FTEs in FY 2005; and 166-366 in FY 2006.</li> <li>• DOE plans to complete the announced 2002-03 studies on 1,180 FTE by 12/04.</li> <li>• In the next quarter, OMB may be able to determine a timeframe for when DOE can get to green.</li> </ul>

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**Instructions for Scorecard Presentation**

Accountability/Contact Information

List the name and title of the agency's lead for the initiative. Also, list the names of the OMB Resource Management Office (RMO) examiner and the OPM or OMB statutory office lead staff for the initiative.

Current Status Column

Indicate the status rating (green, yellow, or red) for the quarter based on which of the Standards for Success have been achieved. (See <http://www.results.gov/agenda/standards.pdf> for listing of standards for five government-wide initiatives.)

If the status rating changed from the previous quarter, the rating should be followed by an up or down arrow, as appropriate. If the rating improved from red to green or deteriorated from green to red, two arrows should be used. Indicate the estimated date (quarter and year) of the next status improvement. If the agency has already achieved green status for the initiative, the note can be deleted.

Example:      Next ↑  
                 est. by  
                 FY 2004  
                 Q3

The current status column has been standardized to present a check list for the Standards for Success. This presentation will make it clear which of the green and yellow standards have been achieved for each of the initiatives. Although short hand descriptions have been used to identify the standards in the quarterly scorecards, an agency must meet all the specifications identified in the Standards for Success. The checklist is presented in the order of the green standards and sub-bullets generally correspond to the yellow and green levels for the standard. (Because in Improving Financial Performance, there is greater potential for an agency to move from red to green for a particular standard, the red conditions are listed for the audit opinion and material weakness standards.) A space is provided before each of the sub-bullets where one should indicate (with a check or X) if the standard has been achieved. Following each sub-bullet there is a space to enter the date that the standard was achieved or is expected to be achieved. The date can be presented as the month or quarter and the year. It is understood that future dates are approximate and that estimates may change each quarter. In cases where a standard was achieved long ago, there is not need to determine the precise date; either an estimate or a less than symbol (<) with the word date can be included in the space.

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Example:




- No chronic or significant Anti-Deficiency Act Violations  
3 as of < date
  
- Material auditor-reported internal control weaknesses as of Feb 2002  
3 repeat  
\_\_\_ new  
\_\_\_ none

Use bold to highlight any standard that was achieved in the past quarter or is posing particular difficulty. For instance, if an agency does not have plans to achieve a standard or has not taken meaningful action to achieve it, you may wish to bold the standard and put question marks in the space for the date.

Progress Column

Indicate the progress rating (green, yellow, or red) for the quarter based on the definitions listed below:

Definitions of Progress Evaluation

- |         |   |   |
|---------|---|---|
| Green:  |    | Implementation is proceeding according to plans agreed upon with the agencies.  |
| Yellow: |   | Slippage in implementation schedule, quality of deliverables, or other issues requiring adjustments by agency in order to achieve initiative on a timely basis. |
| Red:    |  | Initiative in serious jeopardy. Unlikely to realize objectives without significant management intervention  |

If the progress rating changed from the previous quarter, the rating should be followed by an up or down arrow, as appropriate. If the rating improved from red to green or deteriorated from green to red, two arrows should be used.

Key actions completed in the past quarter and key actions planned for the following quarter should be listed. This list need not be comprehensive, as agencies may have additional steps they are taking to implement the President's Management Agenda. Significant actions, either completed or planned, should be indicated in bold typeface.

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Comments Column

The comments column should provide additional information as necessary to enhance the presentation. For instance, an assessment of an agencies overall progress relative to its Proud to Be goals should be provided. Other information to be included, as appropriate, includes:

- Identification of any critical actions planned after the next quarter;
- Discussion of any assistance that OPM and/or OMB may need to provide the agency in the next few quarters to assist with a pending status improvement; and
- Discussion of other relevant issues such as legislative barriers or other risks to implementing the PMA, current appropriations status of funding proposals relating to implementation of the PMA, changes in agency management of PMA initiatives, etc.

Overall

The quarterly scorecards should not exceed one page per initiative.